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ECONOMIC DEVELOPMENT & TOURISM**
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September 2024 Hawai'i Vacation Rental Performance Report

Vacation rentals across Hawai'i reported increases in supply, average daily rate (ADR) and demand, with a lower occupancy rate in September 2024 when compared to September 2023. In comparison to pre-pandemic September 2019, ADR was higher in September 2024 but vacation rental supply, demand and occupancy were lower.

In September 2024, the total monthly supply of statewide vacation rentals was 845,600 unit nights (+19.5% vs. 2023, -7.4% vs. 2019) and monthly demand was 381,100 unit nights (+2.1% vs. 2023, -38.8% vs. 2019) (Figures 1 and 2). This combination resulted in an average monthly unit occupancy of 45.1 percent (-7.7 percentage points vs. 2023, -23.1 percentage points vs. 2019) for September. Occupancy for Hawai'i's hotels was 68.9 percent in September 2024.

The ADR for vacation rental units statewide in September was \$301 (+15.8% vs. 2023, +55.5% vs. 2019). By comparison, the ADR for hotels was \$316 in September 2024. It is important to note that unlike hotels, units in vacation rentals are not necessarily available year-round or each day of the month and often accommodate a larger number of guests than traditional hotel rooms.

The data in DBEDT's Hawai'i Vacation Rental Performance Report specifically excludes units reported in DBEDT's Hawai'i Hotel Performance Report and Hawai'i Timeshare Quarterly Survey Report. A vacation rental is defined as the use of a rental house, condominium unit, private room in a private home, or shared room/space in a private home. This report does not determine or differentiate between units that are permitted or unpermitted. The legality of any given vacation rental unit is determined on a county basis.

Island Highlights

In September 2024, Maui County had the largest vacation rental supply at 263,900 available unit nights in September (+77.9% vs. 2023, -15.6% vs. 2019). Unit demand was 120,400 unit nights (+68.0% vs. 2023, -46.7% vs. 2019), resulting in 45.6 percent occupancy (-2.7 percentage points vs. 2023, -26.6 percentage points vs. 2019) and ADR at \$352 (+32.4% vs. 2023, +54.7% vs. 2019). In September 2023, many vacation rental units were unavailable in West Maui due to the Maui wildfires that occurred in Lahaina on August 8, 2023. Unit night supply and unit night demand were inactive for the entire month of September in West Maui. For September 2024, Maui County hotels reported ADR at \$453 and occupancy of 52.6 percent.

O'ahu vacation rental supply was 230,500 available unit nights (+3.1% vs. 2023, -4.7% vs. 2019). Unit demand was 118,300 unit nights (-5.4% vs. 2023, -32.6% vs. 2019), resulting in 51.3 percent occupancy (-4.6 percentage points vs. 2023, -21.3 percentage points vs. 2019) with ADR at \$251 (+11.4% vs. 2023, +57.3% vs. 2019). In comparison, O'ahu hotels reported ADR at \$258 and occupancy of 76.9 percent for September 2024.

The island of Hawai'i vacation rental supply was 214,600 available unit nights (+2.7% vs. 2023, -2.1% vs. 2019) in September. Unit demand was 81,800 unit nights (-12.1% vs. 2023, -36.0% vs. 2019), resulting in 38.1 percent occupancy (-6.4 percentage points vs. 2023, -20.2 percentage points vs. 2019) with ADR at \$241 (+12.5% vs. 2023, +64.9% vs. 2019). Hawai'i Island hotels reported ADR at \$348 and occupancy of 62.0 percent.

Kaua'i had the fewest number of available vacation rental unit nights in September at 136,600 (+7.7% vs. 2023, -2.0% vs. 2019). Unit demand was 60,600 unit nights (-27.4% vs. 2023, -34.7% vs. 2019), resulting in 44.3 percent occupancy (-21.4 percentage points vs. 2023, -22.2 percentage points vs. 2019) with ADR at \$379 (+5.7% vs. 2023, +57.3% vs. 2019). Kaua'i hotels reported ADR at \$394 and occupancy of 72.6 percent.

First Nine Months of 2024

For the first nine months of 2024, Hawai'i vacation rental supply was 7.2 million unit nights (+12.2% vs. 2023, -3.8% vs. 2019) and demand was 3.8 million unit nights (+3.7% vs. 2023, -31.8% vs. 2019). 2024 average daily unit rate was \$323 (+6.2% vs. 2023, +56.6% vs. 2019). Statewide vacation rental occupancy for the first nine months of 2024 was 53.1 percent (-7.5 percentage points vs. 2023, -29.1 percentage points vs. 2019). In comparison, statewide hotel ADR for the first nine months of 2024 was \$365 and occupancy was 74.4 percent.

Tables of vacation rental performance statistics, including data presented in the report are available for viewing online at: <http://dbedt.hawaii.gov/visitor/vacation-rental-performance/>

About the Hawai'i Vacation Rental Performance Report

The Hawai'i Vacation Rental Performance Report is produced using data compiled by Lighthouse Intelligence, Ltd. (formerly known as Transparent Intelligence, Inc.), which was selected by DBEDT as the provider for these data services.

The report includes data for properties that are listed on Airbnb, Booking.com, Vrbo and TripAdvisor. Data for units included in DBEDT's Hawai'i Hotel Performance Report and Hawai'i Timeshare Quarterly Report have been excluded from the Hawai'i Vacation Rental Performance Report. This report also does not determine or differentiate between units that are permitted or unpermitted. The legality of any given vacation rental unit is determined on a county basis. DBEDT does not support illegal vacation rentals.

Lighthouse enriches their occupancy and price calculations with reservation system data provided by vacation rental software providers, online travel agencies and local property managers. Currently, the reservation systems data provided by data partners represent about 32.1 percent of the estimated total unique vacation rental properties in the State of Hawai'i. On a county level, reservation system data represents 28.5 percent of Maui County coverage; 37.7 percent of Honolulu County coverage; 34.4 percent of Hawai'i County coverage; and 26.0 percent of Kaua'i County coverage of the estimated number of unique vacation rental properties.

For September 2024, the report included data for 34,050 units, representing 59,179 bedrooms in the Hawaiian Islands.

Figure 1: Hawai'i Vacation Rental Performance September 2024

	Unit Night Supply			Unit Night Demand			Unit Occupancy %			Unit Average Daily Rate		
	2024	2023	% Change	2024	2023	% Change	2024	2023	Percentage Pt. Change	2024	2023	% Change
State of Hawai'i	845,571	707,670	19.5%	381,092	373,180	2.1%	45.1%	52.7%	-7.7%	\$301.20	\$260.11	15.8%
O'ahu	230,457	223,513	3.1%	118,338	125,077	-5.4%	51.3%	56.0%	-4.6%	\$251.34	\$225.59	11.4%
Waikīkī	130,210	128,890	1.0%	81,713	83,965	-2.7%	62.8%	65.1%	-2.4%	\$205.39	\$191.56	7.2%
Maui County	263,935	148,351	77.9%	120,431	71,690	68.0%	45.6%	48.3%	-2.7%	\$352.32	\$266.14	32.4%
Wailea/Kīhei	121,816	119,937	1.6%	59,084	59,888	-1.3%	48.5%	49.9%	-1.4%	\$292.14	\$272.41	7.2%
Lahaina/Kā'anapali/ Nāpili/Kapalua	111,737	0	NA	48,301	0	NA	43.2%	0.0%	43.2%	\$451.27	\$0.00	NA
Island of Hawai'i	214,611	209,053	2.7%	81,771	93,047	-12.1%	38.1%	44.5%	-6.4%	\$240.61	\$213.89	12.5%
Kona	107,694	107,254	0.4%	41,914	50,390	-16.8%	38.9%	47.0%	-8.1%	\$237.85	\$219.38	8.4%
Hilo/Honoka'a	45,040	43,794	2.8%	18,132	19,340	-6.2%	40.3%	44.2%	-3.9%	\$151.11	\$131.81	14.6%
Kaua'i	136,568	126,753	7.7%	60,552	83,366	-27.4%	44.3%	65.8%	-21.4%	\$378.78	\$358.29	5.7%

Source: Lighthouse Intelligence, Ltd. © Copyright 2024 State of Hawaii Department of Business, Economic Development & Tourism

Figure 2: Hawai'i Vacation Rental Performance September 2024 vs. 2019

	Unit Night Supply			Unit Night Demand			Unit Occupancy %			Unit Average Daily Rate		
	2024	2019	% Change	2024	2019	% Change	2024	2019	Percentage Pt. Change	2024	2019	% Change
State of Hawai'i	845,571	913,285	-7.4%	381,092	622,329	-38.8%	45.1%	68.1%	-23.1%	\$301.20	\$193.68	55.5%
O'ahu	230,457	241,811	-4.7%	118,338	175,705	-32.6%	51.3%	72.7%	-21.3%	\$251.34	\$159.73	57.3%
Waikīkī	130,210	122,474	6.3%	81,713	96,277	-15.1%	62.8%	78.6%	-15.9%	\$205.39	\$139.56	47.2%
Maui County	263,935	312,810	-15.6%	120,431	226,059	-46.7%	45.6%	72.3%	-26.6%	\$352.32	\$227.74	54.7%
Wailea/Kīhei	121,816	148,992	-18.2%	59,084	110,755	-46.7%	48.5%	74.3%	-25.8%	\$292.14	\$219.34	33.2%
Lahaina/Kā'anapali/ Nāpili/Kapalua	111,737	127,058	-12.1%	48,301	90,022	-46.3%	43.2%	70.9%	-27.6%	\$451.27	\$252.21	78.9%
Island of Hawai'i	214,611	219,294	-2.1%	81,771	127,821	-36.0%	38.1%	58.3%	-20.2%	\$240.61	\$145.90	64.9%
Kona	107,694	102,068	5.5%	41,914	63,738	-34.2%	38.9%	62.4%	-23.5%	\$237.85	\$121.78	95.3%
Hilo/Honoka'a	45,040	49,347	-8.7%	18,132	26,628	-31.9%	40.3%	54.0%	-13.7%	\$151.11	\$102.24	47.8%
Kaua'i	136,568	139,370	-2.0%	60,552	92,744	-34.7%	44.3%	66.5%	-22.2%	\$378.78	\$240.86	57.3%

Source: Lighthouse Intelligence, Ltd. © Copyright 2024 State of Hawaii Department of Business, Economic Development & Tourism

Figure 3: Hawai'i Vacation Rental Performance Year-to-Date September 2024

	Unit Night Supply			Unit Night Demand			Unit Occupancy %			Unit Average Daily Rate		
	2024	2023	% Change	2024	2023	% Change	2024	2023	Percentage Pt. Change	2024	2023	% Change
State of Hawai'i	7,231,892	6,447,644	12.2%	3,838,503	3,700,539	3.7%	53.1%	57.4%	-7.5%	\$322.60	\$303.68	6.2%
O'ahu	2,010,814	1,865,065	7.8%	1,184,363	1,110,432	6.7%	58.9%	59.5%	-1.1%	\$264.16	\$241.55	9.4%
Waikīkī	1,171,845	1,114,031	5.2%	801,928	737,548	8.7%	68.4%	66.2%	3.4%	\$215.12	\$202.72	6.1%
North Shore	222,798	213,148	4.5%	116,794	120,592	-3.1%	52.4%	56.6%	-7.3%	\$401.35	\$373.10	7.6%
Other Honolulu	171,116	160,734	6.5%	62,362	66,427	-6.1%	36.4%	41.3%	-11.8%	\$199.16	\$193.02	3.2%
Leeward/Mākaaha Side	221,994	178,393	24.4%	111,512	93,187	19.7%	50.2%	52.2%	-3.8%	\$484.39	\$396.86	22.1%
Windward Side	161,590	146,766	10.1%	66,454	66,114	0.5%	41.1%	45.0%	-8.7%	\$334.85	\$307.94	8.7%
Ala Moana Area	47,029	41,922	12.2%	20,444	23,056	-11.3%	43.5%	55.0%	-21.0%	\$207.44	\$137.91	50.4%
Airport Area	14,442	10,071	43.4%	4,869	3,508	38.8%	33.7%	34.8%	-3.2%	\$113.15	\$106.38	6.4%
Maui County	2,194,630	1,873,182	17.2%	1,172,439	1,150,867	1.9%	53.4%	61.4%	-13.0%	\$391.00	\$373.31	4.7%
Wailea/Kīhei	996,881	911,697	9.3%	560,653	540,726	3.7%	56.2%	59.3%	-5.2%	\$329.50	\$316.44	4.1%
Lahaina/Kā'anapali/ Nāpili/Kapalua	937,098	724,847	29.3%	487,338	481,000	1.3%	52.0%	66.4%	-21.6%	\$492.90	\$468.19	5.3%
Mā'alaea	105,725	88,837	19.0%	55,506	54,529	1.8%	52.5%	61.4%	-14.5%	\$280.76	\$262.89	6.8%
Kahului/Wailuku	66,582	63,267	5.2%	31,070	36,589	-15.1%	46.7%	57.8%	-19.3%	\$296.97	\$280.52	5.9%
Kula/Makawao Area	17,931	14,840	20.8%	7,704	8,507	-9.4%	43.0%	57.3%	-25.1%	\$261.94	\$239.63	9.3%
Hāna Area	14,933	15,444	-3.3%	9,953	10,930	-8.9%	66.7%	70.8%	-5.8%	\$382.64	\$376.24	1.7%
<i>Island of Maui</i>	<i>2,139,150</i>	<i>1,818,932</i>	<i>17.6%</i>	<i>1,152,224</i>	<i>1,132,281</i>	<i>1.8%</i>	<i>53.9%</i>	<i>62.2%</i>	<i>-13.5%</i>	<i>\$395.39</i>	<i>\$377.16</i>	<i>4.8%</i>
<i>Moloka'i</i>	<i>53,893</i>	<i>52,708</i>	<i>2.2%</i>	<i>19,490</i>	<i>17,548</i>	<i>11.1%</i>	<i>36.2%</i>	<i>33.3%</i>	<i>8.6%</i>	<i>\$136.28</i>	<i>\$132.29</i>	<i>3.0%</i>
<i>Lāna'i</i>	<i>1,587</i>	<i>1,542</i>	<i>2.9%</i>	<i>725</i>	<i>1,038</i>	<i>-30.2%</i>	<i>45.7%</i>	<i>67.3%</i>	<i>-32.1%</i>	<i>\$256.23</i>	<i>\$240.16</i>	<i>6.7%</i>
Island of Hawai'i	1,841,159	1,681,920	9.5%	869,301	860,609	1.0%	47.2%	51.2%	-7.7%	\$258.60	\$239.14	8.1%
Kona	927,259	849,562	9.1%	433,250	435,422	-0.5%	46.7%	51.3%	-8.8%	\$250.91	\$238.26	5.3%
Kohala/Waimea/Kawaihae	399,341	357,193	11.8%	190,692	182,208	4.7%	47.8%	51.0%	-6.4%	\$410.34	\$370.72	10.7%
Hilo/Honoka'a	399,871	373,803	7.0%	193,234	189,861	1.8%	48.3%	50.8%	-4.9%	\$152.61	\$138.64	10.1%
Volcano Area	95,818	81,316	17.8%	44,529	43,195	3.1%	46.5%	53.1%	-12.5%	\$162.93	\$156.35	4.2%
Nā'ālehu /Ka'ū	18,870	20,046	-5.9%	7,596	9,923	-23.5%	40.3%	49.5%	-18.7%	\$144.77	\$145.02	-0.2%
Kaua'i	1,185,289	1,027,477	15.4%	612,400	578,631	5.8%	51.7%	56.3%	-8.3%	\$395.50	\$380.45	4.0%
Princeville/Hanalei	514,018	442,981	16.0%	241,005	233,256	3.3%	46.9%	52.7%	-11.0%	\$374.18	\$350.37	6.8%
Po'ipū/Kukui'ūla	342,774	307,509	11.5%	206,233	192,241	7.3%	60.2%	62.5%	-3.8%	\$481.35	\$467.49	3.0%
Wailua/Kapa'a	207,828	176,681	17.6%	110,326	104,177	5.9%	53.1%	59.0%	-10.0%	\$322.68	\$310.61	3.9%
Līhu'e	110,921	91,208	21.6%	49,608	43,263	14.7%	44.7%	47.4%	-5.7%	\$311.79	\$329.54	-5.4%
Kalāheo/Waimea	9,474	8,825	7.4%	5,228	5,694	-8.2%	55.2%	64.5%	-14.5%	\$322.55	\$338.52	-4.7%

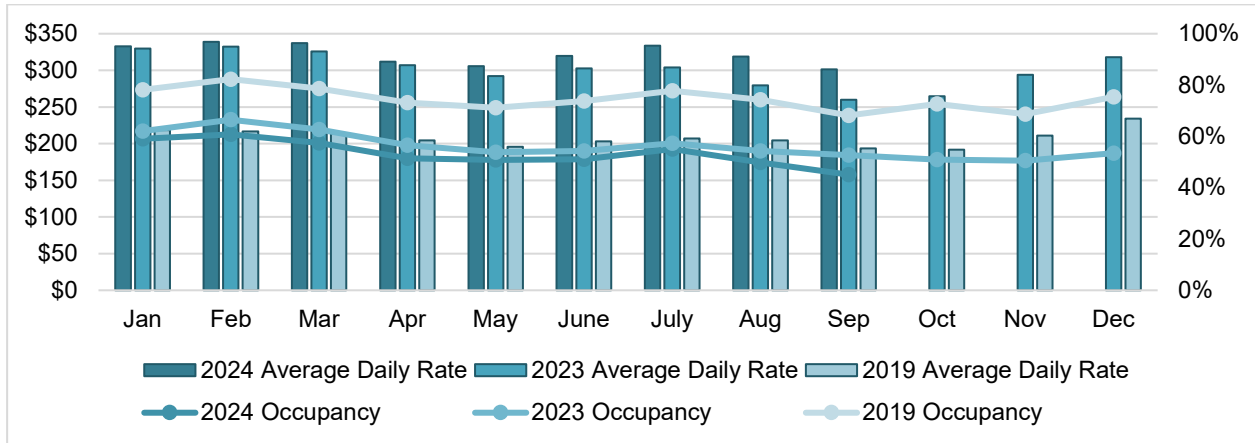
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Figure 4: Hawai'i Vacation Rental Performance Year-to-Date September 2024 vs. 2019

	Unit Night Supply			Unit Night Demand			Unit Occupancy %			Unit Average Daily Rate		
	2024	2019	% Change	2024	2019	% Change	2024	2019	Percentage Pt. Change	2024	2019	% Change
State of Hawai'i	7,231,892	7,520,482	-3.8%	3,838,503	5,630,083	-31.8%	53.1%	74.9%	-29.1%	\$322.60	\$205.97	56.6%
O'ahu	2,010,814	2,484,035	-19.1%	1,184,363	1,880,322	-37.0%	58.9%	75.7%	-22.2%	\$264.16	\$166.20	58.9%
Waikīkī	1,171,845	1,036,941	13.0%	801,928	821,503	-2.4%	68.4%	79.2%	-13.6%	\$215.12	\$145.81	47.5%
North Shore	222,798	385,367	-42.2%	116,794	286,285	-59.2%	52.4%	74.3%	-29.4%	\$401.35	\$192.26	108.8%
Other Honolulu	171,116	350,476	-51.2%	62,362	250,057	-75.1%	36.4%	71.3%	-48.9%	\$199.16	\$162.12	22.8%
Leeward/Mākaaha Side	221,994	295,109	-24.8%	111,512	212,579	-47.5%	50.2%	72.0%	-30.3%	\$484.39	\$202.27	139.5%
Windward Side	161,590	348,120	-53.6%	66,454	260,694	-74.5%	41.1%	74.9%	-45.1%	\$334.85	\$187.54	78.5%
Ala Moana Area	47,029	39,070	20.4%	20,444	27,812	-26.5%	43.5%	71.2%	-38.9%	\$207.44	\$124.76	66.3%
Airport Area	14,442	28,952	-50.1%	4,869	21,392	-77.2%	33.7%	73.9%	-54.4%	\$113.15	\$83.57	35.4%
Maui County	2,194,630	2,328,592	-5.8%	1,172,439	1,839,748	-36.3%	53.4%	79.0%	-32.4%	\$391.00	\$247.87	57.7%
Wailea/Kthei	996,881	1,102,715	-9.6%	560,653	880,269	-36.3%	56.2%	79.8%	-29.5%	\$329.50	\$239.40	37.6%
Lahaina/Kā'anapali/ Nāpili/Kapalua	937,098	933,452	0.4%	487,338	737,216	-33.9%	52.0%	79.0%	-34.2%	\$492.90	\$276.88	78.0%
Mā'alaea	105,725	92,149	14.7%	55,506	75,679	-26.7%	52.5%	82.1%	-36.1%	\$280.76	\$191.20	46.8%
Kahului/Wailuku	66,582	85,647	-22.3%	31,070	66,929	-53.6%	46.7%	78.1%	-40.3%	\$296.97	\$196.24	51.3%
Kula/Makawao Area	17,931	23,028	-22.1%	7,704	17,394	-55.7%	43.0%	75.5%	-43.1%	\$261.94	\$188.34	39.1%
Hāna Area	14,933	20,071	-25.6%	9,953	17,020	-41.5%	66.7%	84.8%	-21.4%	\$382.64	\$270.07	41.7%
Island of Maui	2,139,150	2,257,062	-5.2%	1,152,224	1,794,507	-35.8%	53.9%	79.5%	-32.3%	\$395.39	\$250.95	57.6%
Moloka'i	53,893	67,715	-20.4%	19,490	42,902	-54.6%	36.2%	63.4%	-42.9%	\$136.28	\$119.55	14.0%
Lāna'i	1,587	3,815	-58.4%	725	2,339	-69.0%	45.7%	61.3%	-25.5%	\$256.23	\$236.25	8.5%
Island of Hawai'i	1,841,159	1,678,859	9.7%	869,301	1,121,261	-22.5%	47.2%	66.8%	-29.3%	\$258.60	\$161.84	59.8%
Kona	927,259	815,895	13.6%	433,250	583,098	-25.7%	46.7%	71.5%	-34.6%	\$250.91	\$133.30	88.2%
Kohala/Waimea/Kawaihae	399,341	413,778	-3.5%	190,692	275,680	-30.8%	47.8%	66.6%	-28.3%	\$410.34	\$282.75	45.1%
Hilo/Honoka'a	399,871	325,092	23.0%	193,234	191,890	0.7%	48.3%	59.0%	-18.1%	\$152.61	\$92.76	64.5%
Volcano Area	95,818	95,778	0.0%	44,529	54,173	-17.8%	46.5%	56.6%	-17.8%	\$162.93	\$114.35	42.5%
Nā'ālehu /Ka'ū	18,870	28,316	-33.4%	7,596	16,420	-53.7%	40.3%	58.0%	-30.6%	\$144.77	\$109.05	32.8%
Kaua'i	1,185,289	1,028,996	15.2%	612,400	788,752	-22.4%	51.7%	76.7%	-32.6%	\$395.50	\$265.76	48.8%
Princeville/Hanalei	514,018	406,361	26.5%	241,005	315,790	-23.7%	46.9%	77.7%	-39.7%	\$374.18	\$266.30	40.5%
Po'ipū/Kukui'ula	342,778	372,642	-8.0%	206,233	280,700	-26.5%	60.2%	75.3%	-20.1%	\$481.35	\$308.91	55.8%
Wailua/Kapa'a	207,828	172,361	20.6%	110,326	132,415	-16.7%	53.1%	76.8%	-30.9%	\$322.68	\$200.17	61.2%
Līhu'e	110,921	59,338	86.9%	49,608	45,832	8.2%	44.7%	77.2%	-42.1%	\$311.79	\$191.17	63.1%
Kalāheo/Waimea	9,474	17,931	-47.2%	5,228	13,845	-62.2%	55.2%	77.2%	-28.5%	\$322.55	\$253.87	27.1%

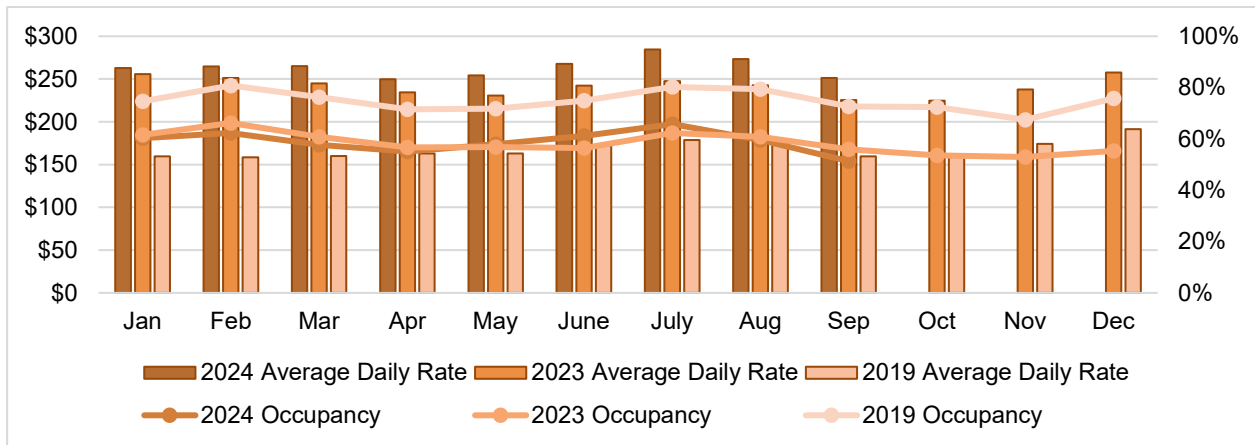
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Figure 5: Monthly State of Hawai'i Vacation Rental Performance - 2024 vs. 2023 vs. 2019



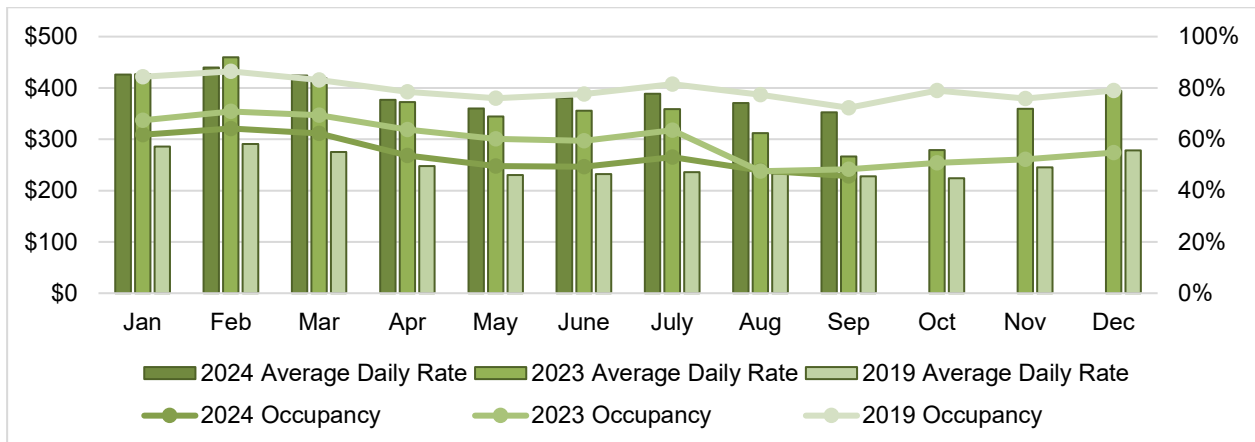
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Figure 6: Monthly O'ahu Vacation Rental Performance - 2024 vs. 2023 vs. 2019



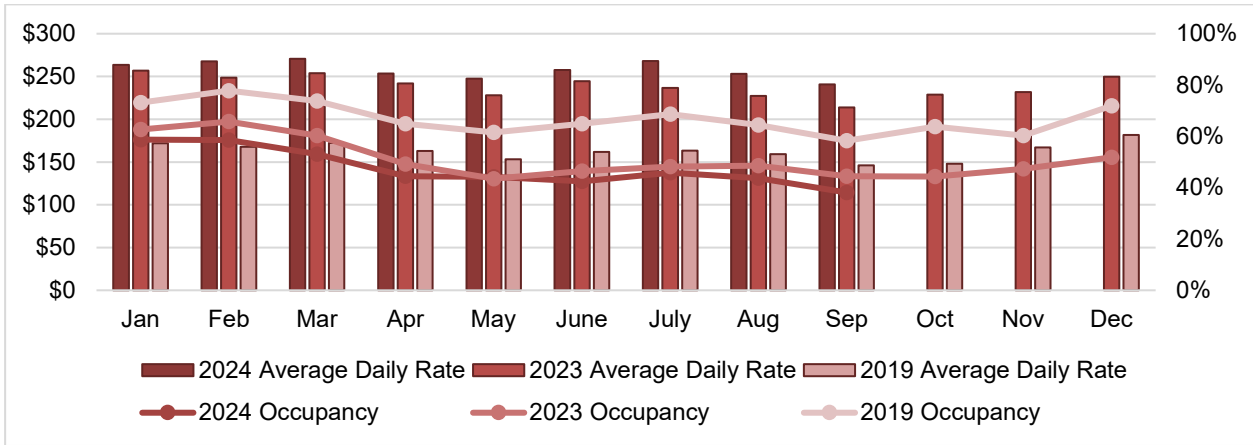
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Figure 7: Monthly Maui County Vacation Rental Performance - 2024 vs. 2023 vs. 2019



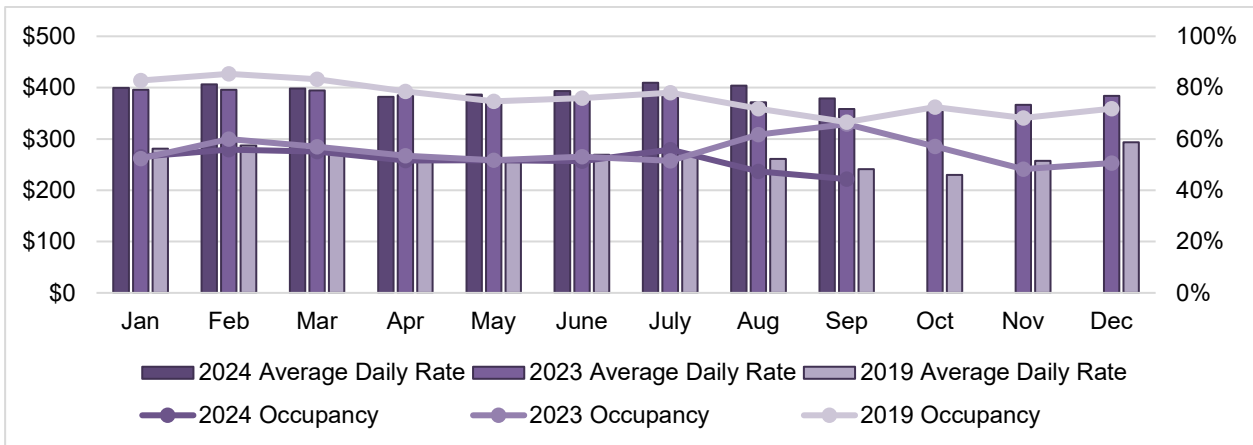
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Figure 8: Monthly Island of Hawai'i Vacation Rental Performance - 2024 vs. 2023 vs. 2019



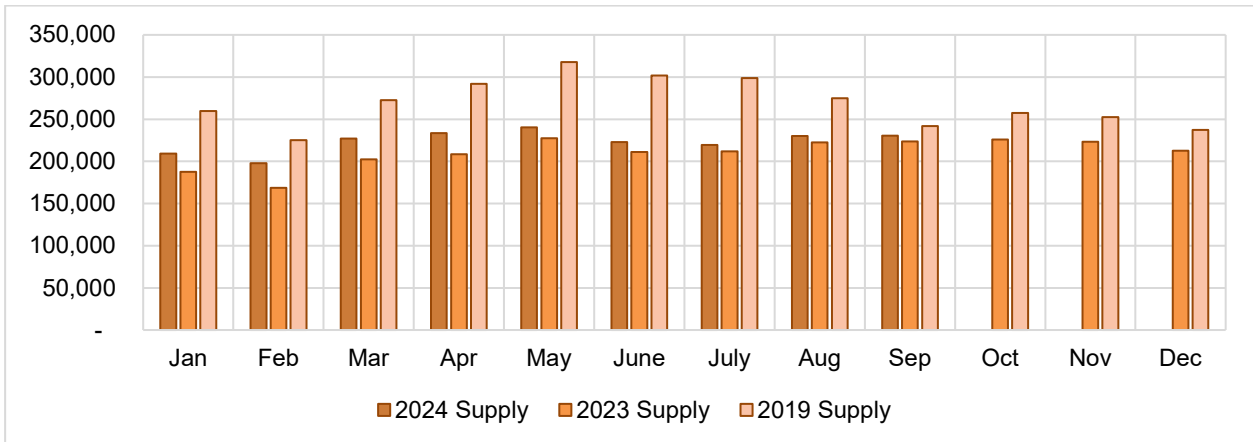
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Figure 9: Monthly Kaua'i Vacation Rental Performance - 2024 vs. 2023 vs. 2019



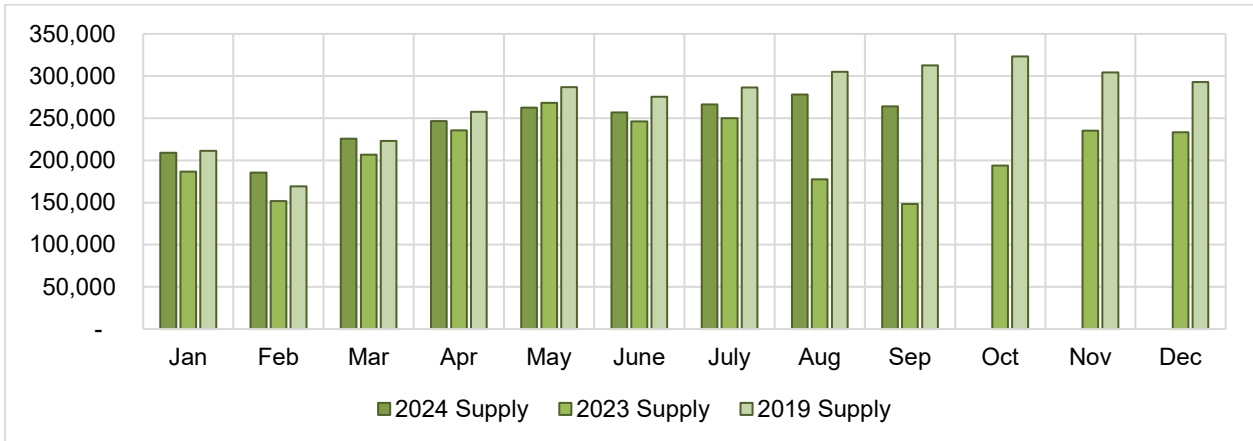
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Figure 10: Monthly O'ahu Unit Night Supply - 2024 vs. 2023 vs. 2019



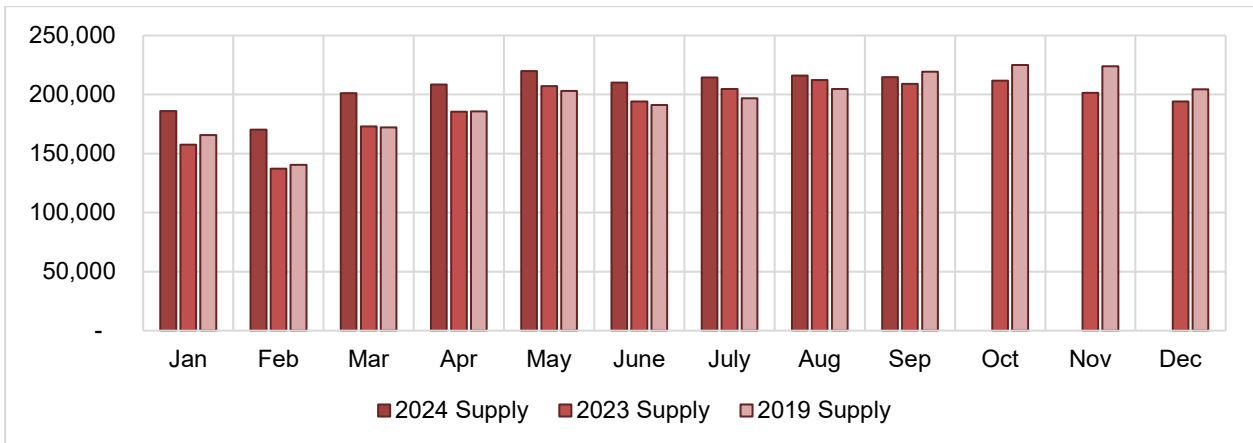
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Figure 11: Monthly Maui County Unit Night Supply - 2024 vs. 2023 vs. 2019



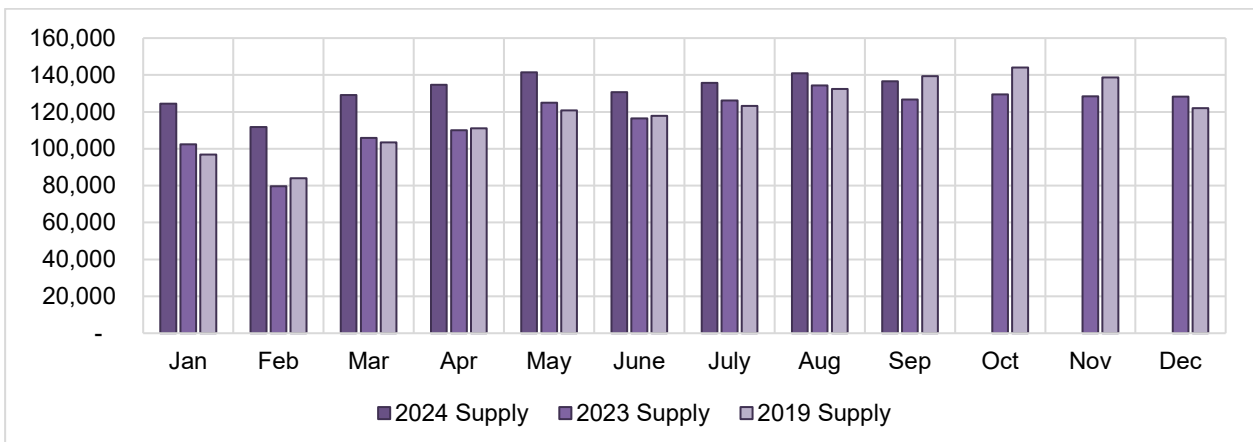
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Figure 12: Monthly Island of Hawai'i Unit Night Supply - 2024 vs. 2023 vs. 2019



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Figure 13: Monthly Kaua'i Unit Night Supply - 2024 vs. 2023 vs. 2019



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